SharePoint 2003 User's Guide

SETH BATES AND TONY SMITH

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SharePoint 2003 User's Guide

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Foreword

At DataLan Corporation, we spend a significant amount of time discussing a select group of people that we refer to as *Professional Information Workers*. We define this group as people who spend most of their working day creating documents and sending e-mail. Personally, I use a simple litmus test to identify Professional Information Workers; if you start your day checking mail in Microsoft Outlook, then you are probably a Professional Information Worker. I certainly fall squarely into this category.

As Professional Information Workers, we are unique because we deal with data in many different forms such as documents, e-mails, transactional information, schedules, contacts, and task lists. We are often expected to retrieve information from these various sources and synthesize it together so that decisions can be made in a business process. What's more, this usually involves coordinating the efforts of other Professional Information Workers. The challenges of coordinating information, people, and processes within an organization are significant and frustrating.

In the vast majority of organizations, information is stored and retrieved by type as opposed to business context. In other words, documents are stored on a file server simply because they are in document form. Similarly, e-mail is stored on Exchange regardless of the business information the messages contain. The same is true for transactional information, which is all stored in databases. The situation resulting from this seemingly logical decision to store information by type is chaos for the Professional Information Worker.

Imagine for a moment that you are a Professional Information Worker asked to assemble all available information pertaining to your top ten customers. How many different data stores would you have to visit in order to complete a profile for these customers? You might start by searching the file system for all known documents concerning these important customers. Then, you might search your e-mail inbox for related messages. You'd also ask other people to search their inboxes for messages and forward them to you. While everyone is searching for messages, you might ask them to make a list of pertinent contacts they have in Microsoft Outlook and forward them to you as well. Finally, you might request the IT department run a series of reports to assemble financial information about the customers. Profiling your top ten customers turns out to be a significant project that can take days or weeks to complete.

Now imagine that you are a Professional Information Worker responsible for publishing the quarterly financial report internally to executive management. This report is a Microsoft Word document that pulls together information from several different lines of business and includes analysis by key sales and operations managers. Clearly, you have many of the same information issues as I discussed previously, but you now have the additional burden of coordinating several contributors to the same document. In most organizations, this coordination is accomplished by sending countless e-mails with attachments as you attempt to get content reviewed and approved. In all likelihood, you will also need several meetings to coordinate efforts and manage the process. Once again, this turns out to be a significant project that will require days or weeks to complete.

The scenarios I describe are significant because they reveal a wide gap between the needs of Professional Information Workers and the information systems that support them. Consequently, most Professional Information Workers spend the bulk of their day compensating for the weaknesses of these systems. In fact, many Professional Information Workers have simply become part of the overall information system and spend their entire day augmenting, organizing, and managing information. This strikes me as an incredibly poor use of highly talented people.

How did we arrive at this place where people are spending their day bridging data stores together through spreadsheets and e-mail? Well, I suppose it was inevitable. After all, software vendors—including Microsoft—have historically been more concerned with selling discreet applications as opposed to creating an environment that supports Professional Information Workers. All of these discreet applications have found their way onto our desktops, laptops, and servers to create the current mess. This is where SharePoint technology comes into the picture.

SharePoint invites Professional Information Workers to organize and retrieve information differently. Instead of storing data by type, SharePoint provides an infrastructure that allows information to be stored by business context. This means that you can have a single destination, which contains all relevant information for a business topic. Instead of assembling a customer profile manually, for example, you could navigate to a single SharePoint site dedicated to providing a complete customer profile. Similarly, you can have a single SharePoint site dedicated to the creation of a document like the quarterly report in my scenario. While not without some flaws, SharePoint does have the power to transform the way Professional Information Workers access and use information.

While I believe that SharePoint can have significant positive benefits for an organization, it is impossible to overstate the level of change required to bring it to fruition. I have witnessed many organizations install a SharePoint "pilot" project only to see it fail because the end users did not understand how to use the system or embrace the required changes. Ultimately, the success of any SharePoint implementation is in the hands of the Professional Information Workers who use it. Users like you must commit to mastering the SharePoint system, and the *SharePoint 2003 User's Guide* has been written to help you accomplish that goal.

Seth Bates and Tony Smith have been working with Professional Information Workers and helping them embrace SharePoint solutions since the product was released. They are in a unique position to understand the difficulties faced by individuals and organizations when transitioning from a traditional work environment to a SharePoint solution. They have used this knowledge to construct a logical learning path for Professional Information Workers and encapsulate it in a book.

Because a SharePoint solution is a dynamic system driven by the needs of its users, Professional Information Workers must become familiar with the basic building blocks of the system. Seth and Tony have provided this information in the first part of the book, which is essential reading for everyone. The second part of the book focuses on specific business scenarios where SharePoint can be helpful. These scenarios are excellent starting points and will undoubtedly help you visualize new ways to use SharePoint technology. I'd recommend that you review all of the scenarios even if they do not apply directly to your daily work.

In all my years of architecting and building solutions, I have found that projects rarely fail because of the underlying technology. The primary threat to any business solution is that the end users will not accept the system and refuse to change their work habits. This is why the *SharePoint 2003 User's Guide* is so important to the industry. SharePoint is one of the

fastest-growing products in Microsoft history and promises to be as widespread as Microsoft Office itself. Without a strong effort to educate Professional Information Workers, many of these systems will not be successful. I wish you all the best in leading the transformation of your organization.

Scot Hillier
Author of *Microsoft SharePoint: Building Office 2003 Solutions* and *Advanced SharePoint Services Solutions*

About the Authors

SETH BATES is a software architect and practice manager for DataLan Corporation, the 2004 NY/NJ Microsoft Platform Partner of the Year located in White Plains, New York. Seth performed the technical editing for *Microsoft SharePoint: Building Office 2003 Solutions* and *Advanced SharePoint Services Solutions*. He has also been published in *Dr. Dobb's Journal* (his article, titled "SharePoint Web Part Development," appears in the April 2005 edition). Seth has over 7 years of experience engineering business solutions, primarily using Microsoft technologies. With experience in all phases of the software engineering life cycle, he brings a broad mix of analysis, design, and implementation expertise to his work.

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I would like to thank Tony. It seems like an eternity has passed since we first began having grand ideas about publishing a SharePoint book, and finally we have succeeded.

Lastly, I would like to convey my love and appreciation for my wife Jennifer and son Dylan. You have provided support and guidance when I needed it, and I am now looking forward to being able to spend more time with you both.

— Seth Bates

I would like to thank Seth. Working with you on this book has been a positive and enjoyable experience.

Finally, I would like to thank my wife Lynn. I could not have done this without your love and support. You have encouraged and supported me through this entire process.

— Tony Smith

Introduction

SharePoint 2003 is quickly becoming more prevalent in the workplace, and all types of business professionals are becoming involved in using and managing SharePoint-based resources. We have seen many situations where, after SharePoint is introduced, individuals struggle to leverage these resources without a good enough understanding of the capabilities to gain the most value possible. *SharePoint 2003 User's Guide* was an outcome of this need, and our book can serve as a reference for people working within a SharePoint environment.

The goal of this book is to deliver a tool to all levels of SharePoint users. Beginners will be supplied with the information they need to most effectively use SharePoint's capabilities. Intermediate users will be given the information they need to manage their SharePoint resources. Advanced users will be provided the foundation needed for building business solutions using SharePoint's capabilities. We have spent a great deal of effort putting our experiences working with a variety of organizations and knowledge of the product into an easily understood format for learning about SharePoint 2003, which we hope will enable you to gain the in-depth knowledge you need to effectively use and manage these tools.

Further reading about the topics provided in this book can be found at `http://www.sharepointextras.com` where we provide additional information about SharePoint including references to other resources.

Who This Book Is For

The goal of this book is to provide the knowledge necessary for people to effectively use SharePoint. Whether you have not yet used SharePoint, just started using the basic features, or have been using it for a long of time, this book provides the skills you need to work efficiently with the capabilities SharePoint gives you.

If you want to learn about these capabilities in a detailed yet understandable approach, this book is for you. Being a user guide, this book does not require you to have any programming knowledge. It does assume you have a basic understanding of navigating web sites. Some of the more advanced topics require prior working knowledge of Microsoft Office products like Word and Excel.

How This Book Is Organized

The chapters in this book are organized into two groups. Chapters 1 to 7 provide the fundamental knowledge of SharePoint that users need in order to successfully utilize the capabilities supplied by the technology. This group can be used as a reference guide, allowing you to easily look up specific SharePoint topics, and includes step-by-step instructions, figures, tables, and examples. The capabilities described in these chapters are important and act as the building blocks for the second group of chapters.

The second group consists of Chapters 8 to 11. These four chapters present business solutions commonly deployed through SharePoint. Each of these chapters contains an example scenario that will help you understand the challenges faced along with the benefits that SharePoint provides to the situation. The scenarios also include the necessary steps for creating these solutions within a SharePoint environment.

Chapter 1: Introduction to SharePoint Technologies

This chapter introduces you to the world of Microsoft SharePoint. It contains an explanation of the technology, its uses, and related terminology.

Chapter 2: Using the Portal

This chapter provides an understanding of portals and areas making up Microsoft SharePoint Portal Server 2003. We cover security, content, structure, personalization, and search capabilities using detailed examples.

Chapter 3: Using Windows SharePoint Services Sites

This chapter focuses on the use of sites and workspaces created from Windows SharePoint Services. It contains the details you need to understand how to customize and use sites including the available templates, security features, and usage analysis.

Chapter 4: Custom Lists and Data

This chapter provides the knowledge needed to work with lists within SharePoint. We describe the use and management of custom lists in detail. You also learn about the advanced integration with Office that SharePoint's custom lists provide.

Chapter 5: Template Lists

This chapter contains a detailed look at the lists that are provided by SharePoint for you to use as templates when creating your own lists. We discuss the use and management of each list in detail along with any advanced integration with Office that they provide.

Chapter 6: Libraries

This chapter teaches the use and management of libraries within SharePoint. Used to manage a variety of files from Office documents to images, these SharePoint libraries encompass many collaborative features, which we cover in this chapter. Advanced integration between these libraries and Office products, which can enhance your experience with SharePoint, is also covered.

Chapter 7: Pages, Web Parts, and Alerts

Pages and web parts allow for the customization of portals and sites. This chapter uses detailed steps to show you how to customize SharePoint using the various types of pages and the functional components known as web parts. Additionally, we discuss the concept of alerts, which give you a powerful way to notify SharePoint users of changes to information within SharePoint.

Chapter 8: SharePoint Document Collaboration Solutions

One of the most common ways SharePoint is used is to create document collaboration solutions. This chapter describes the challenges SharePoint document collaboration solutions can address, the benefits you can receive by creating these solutions, and tips to be mindful of when creating these solutions. We construct a sample document collaboration solution and describe how the solution would be used.

Chapter 9: SharePoint Project Collaboration Solutions

Project collaboration is another common use for SharePoint. In this chapter, we describe how to create project collaboration solutions through SharePoint. We construct a sample solution and describe the benefits that can be received by creating these solutions.

Chapter 10: SharePoint Meeting Management Solutions

SharePoint provides strong meeting management capabilities. We discuss meeting management and how a SharePoint environment can be configured to support meeting management processes. We also build a sample meeting management solution and describe the benefits that can be received by creating these solutions.

Chapter 11: SharePoint Information Center Solutions

SharePoint is commonly used to create intranet or extranet solutions. We refer to these solutions as information centers. We describe the value of creating SharePoint-based information centers and discuss the capabilities to include and create a sample information center solution.

CHAPTER 1

Introduction to SharePoint Technologies

Microsoft SharePoint technologies are the foundation of the Microsoft Office System. The Office System is a new term Microsoft has coined to describe a collection of applications, servers, and services that work together to improve user and team productivity. These products are tightly integrated and can be combined to address a wide range of business needs. The Office System contains Office 2003 (including new applications like InfoPath and OneNote), Windows SharePoint Services, SharePoint Portal Server 2003, Project Server, and Live Communications Server. The goals behind the Office System are to

- Provide business users better access to information. This includes not only making more information available, but also providing capabilities to locate the information most relevant to a business user's needs.
- Enable groups of individuals within a company and between different companies to work together effectively and more easily share information.
- Improve individual and team productivity by making it easier to create information and provide this information to the appropriate people, allowing them to make informed business decisions.

The Office System products and services are brought together to create Information Worker solutions. An information worker is anyone who contributes knowledge to a business process or uses that knowledge to make decisions. This includes anyone who enters data into systems, discusses that information with others, or takes action based on the information. Information Worker solutions are business solutions, which include applications and processes, that allow information workers to improve their productivity, enhance collaboration with others, make information available to others, and reduce the time it takes to make accurate, informed business decisions.

Microsoft SharePoint technologies are an integral part of the Office System framework. SharePoint is the next generation of Microsoft's information management and collaboration platform and provides the foundation on which Information Worker solutions are built.

What Is Microsoft SharePoint?

Microsoft SharePoint is made up of two main products, Windows SharePoint Services and SharePoint Portal Server 2003. Windows SharePoint Services (WSS) is an add-on service for Windows Server 2003. Through WSS Microsoft provides the platform and services necessary to build information sharing and collaboration solutions. WSS is an individual and team productivity platform and a key component in the development of Information Worker solutions. WSS provides web-based team collaboration services needed to enable information workers to effectively create, manage, and share documents and other information. In addition to the creation of collaborative web sites, WSS can be used as the foundation for the development of business applications and to provide the information management capabilities needed by these applications.

Microsoft SharePoint Portal Server 2003 (SPS) is a set of technologies designed to unify systems and information from different sources into enterprise solutions to effectively bring together people, information, and processes. SPS includes navigational capabilities that help guide business users through enterprise resources including WSS sites, documents, applications, processes, and data. SPS contains powerful searching and indexing capabilities, which allow for relevant, high-quality information to be easily located and accessed regardless of where this information is located in the enterprise and in what system this information resides. Targeting particular information to groups of users and allowing users to create their own customized spaces within the portal are also features of SharePoint Portal Server. SPS expands on the development capabilities of WSS, allowing application developers to use virtually all of the capabilities of SPS and WSS within their custom applications.

Why Is It Valuable?

Together Windows SharePoint Services and SharePoint Portal Server provide the next step in the evolution of the Microsoft information management and collaboration platform. They provide an application solutions foundation, a document management and collaboration platform, and the building blocks necessary to create Information Worker solutions. Through the use of these products intelligent portal-based solutions can be created to connect teams of business users with the applications, processes, and information they need to perform their jobs.

In the current work environment individuals often find it difficult to identify and locate information they need in a timely manner. When they do find needed information, it is often outdated and no longer relevant. As multiple workers collaborate on content, multiple versions are created, and confusion occurs when workers become unaware which version is current. Also, when more than one worker is responsible for editing information, there is a high risk of this information being lost in the transition. These different versions of the information get copied to numerous locations and are often e-mailed to large groups of people unnecessarily, wasting disk space and resulting in confusion about which version is the latest copy. Conversely, managers and other workers needing these materials are not notified that the information is available or when the information is updated after it has been distributed. All of these issues result in time being lost to searching for information and verifying the accuracy of the information.

In the first part of this book, Chapters 2 through 7, we will discuss the components that make up a SharePoint environment and give you the information you need to effectively work with these components. Then in the second part of this book, Chapters 8 through 11, we will discuss some of the most common situations in which SharePoint solutions are used to solve a variety of business challenges. The solutions that we will focus our discussions around include the following:

- *Document collaboration*: Often the goal of a group of information workers is to create materials based on enterprise information. Often these individuals are geographically dispersed, with each individual needing the same level of access to the materials being created and the enterprise information the materials are based on. The group must know where the most recent copies of documents are located and be able to gain the appropriate level of access to these items. In addition, the ability to effectively communicate between team members is crucial to the efficiency of the collaboration process. The management of responsibilities and deadlines around the creation of the materials is also important to the document collaboration process.

- *Project collaboration*: When teams of people are brought together to work on a project, how well the project is managed will significantly impact its success. All aspects of the project, including the process, communications, deliverables, timelines, and tasks, need to be properly managed to ensure the success of the project. All interested parties, including team members, stakeholders, and managers, need visibility into the progress of the project and all associated resources. These individuals need to be kept aware of project status, timelines, issues, and any other pertinent information.

- *Meeting management*: Individuals spend a significant amount of time preparing for and participating in meetings. Organizations often try to find ways to reduce the quantity and duration of meetings in order to reduce the impact meetings have on people's time. To increase the effectiveness of a meeting, all aspects of the meeting must be properly managed. This includes preparation tasks, meeting facilitation, and post-meeting follow-up. Prior to a meeting, objectives and agendas must be defined and meeting materials must be created. These items must then be communicated to attendees so that they can adequately prepare for the meeting. During a meeting, facilitators need to keep the meeting on topic, decisions must be recorded, and action items must be tracked. Finally, after the meeting, follow-up materials must be distributed and the progress of the identified action items must be managed. Managing these aspects must also take into account remote meeting attendance so that remote attendees can effectively participate in the meeting.

- *Information centers*: Organizations often need to provide groups of individuals the ability to distribute items for use throughout the organization. Information owners will create and then need to publish materials for use by others. The information owners need to be able to effectively manage these materials, keeping them current and verifying that they are accurate. These materials also must to be organized in such a way that they are easy to find when they are needed.

What Are the Building Blocks?

Windows SharePoint Services and SharePoint Portal Server 2003 include many tools that can be combined to create a wide range of business solutions. Sites and workspaces provide a central place to consolidate a wide variety of information in a secure manner. Lists and libraries allow users to create and edit documents and other information. Alerts give users the ability to receive notifications when content has been added or changed. Pages and web parts allow for the customization of sites so that data and documents are presented in ways that make it easier for workers to find the information they need. Portal area navigation and searching capabilities provide the tools necessary to find relevant information when it is needed regardless of its location. My Site allows you to create your own customized site in SharePoint Portal Server to store your documents, tasks, and other information, and then make any of this information available to others.

In this book we will further define what these tools are, how they are used, and how to combine them into useful Information Worker solutions.

CHAPTER 2

Using the Portal

A SharePoint Portal Server 2003 (SPS) portal is the entry point into a SharePoint environment. A portal acts as the centralized access point for locating, working with, and managing an organization's information. The portal allows you to do the following:

- Search for information, such as people, sites, and documents, regardless of the information's location or format. This enables you to retrieve all relevant information you have access to on a topic or containing specific references.
- Organize information into meaningful structures using areas so that portal users can easily browse through this information.
- Maintain personal sites that enable you to create personal views of portal information for your use and public views of your information to share with others.
- Create alerts that are personal notifications you can configure to be notified when relevant information is added or changed in SharePoint areas or sites.
- Target specific content to groups of individuals for whom the information is particularly relevant.

In this chapter we will familiarize you with the general layout and structure of SPS. We will describe the elements that make up a SharePoint portal, including areas, listings, portal search, and My Site. We will review the layout of these elements and discuss how they are used.

Portal Areas

Areas are the primary organizational units of a SharePoint portal. They are used to group and structure content so that information can be easily located through browsing. A defined area structure acts as a portal blueprint or site map enabling the creation of an information hierarchy that maps to the way people need to work with the information. Figure 2-1 shows the typical layout of an area.

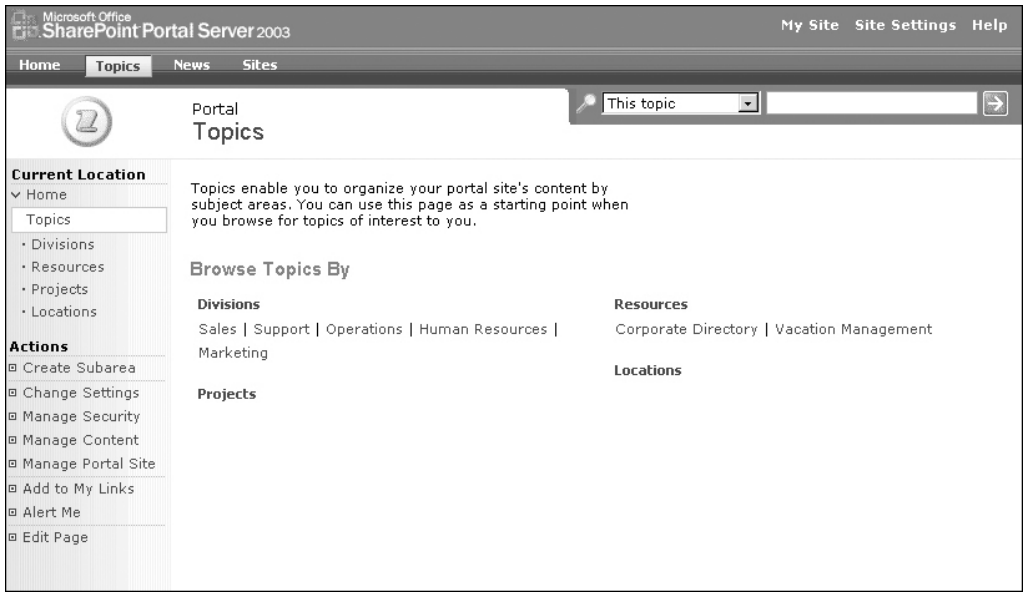

Figure 2-1. *Topics area*

Figure 2-1 shows the default layout of the Topics area. The Topics area is one of the default areas created as part of a new SharePoint portal. An area is organized so that navigation and management options are grouped within the banner and in the left-hand bar, leaving the remainder of the area for the presentation of content, applications, listings, or any other type of information an area manager chooses to make available. We can break an area down into the following groupings of options:

- *Area Listings Bar*: Located across the top of the portal page, the Area Listings Bar presents the list of top-level areas, which includes the home page and any areas directly under the home page. When a portal is initially created, this list will include Home, Topics, News, and Sites. However, this list may differ in your environment as it will reflect the top-level area structure of your SharePoint portal environment.

- *Portal Toolbar*: Located in the top right of the portal, the Portal Toolbar contains portal management and help links. The list of links in this area can include the following:

  - *My Site*: My Site is listed for portal users that have been granted the right to have a personal site. The My Site link gives you access to your personal site. We will discuss My Site in more detail later in this chapter.

  - *Site Settings*: The Site Settings link is available for users having some level of management capabilities within the portal, which is typically someone who is at least a Content Manager for the portal. The Site Settings link gives you access to the Site Settings page containing the portal management tools. From this Site Settings page you will only have access to the management capabilities that have been made available to you based on your role in the portal. Other management capabilities beyond those you have access to may be listed; however, you will not be able to make changes to these other items.
  - *Help*: The Help link is available to all portal users and provides online context-sensitive assistance for SharePoint capabilities.

- *Search Tools*: Located in the upper right just below the Area Listings Bar, the Search Tools allow you to perform basic and advanced searches for information available through SharePoint and crawled by the SharePoint index services. The information available for searching usually includes all content stored in SharePoint Portal Server and Windows SharePoint Services and may also include content stored in other sources, such as Exchange Public Folders, network file shares, or other internal or external web sites.
- *Current Area Navigation*: Located in the left-hand section just below the Area Listing Bar, the Current Area Navigation shows context-centric navigation. This includes the hierarchy of areas above the current location as well as any subareas within the current location. For example, if you are currently in the Divisions area, which is located under the Topics area, and this area has two children called Domestic and International, the area navigation will show the hierarchy of areas above Divisions, which includes Home and Topics, and the list of subareas contained within Divisions, which includes Domestic and International.
- *Actions*: Located in the left-hand section just below the Current Area Navigation, the Actions section provides the list of area management and area content management tasks that are available to you for the currently displayed area. This list only contains those options that are available to you based on your security rights within the area. Table 2-1 shows the options that are available based on a user's site group assignment. Assigning users to site groups defines the rights that those users will have within the portal. We will discuss site groups in more detail in the "Portal Site Groups" section later in this chapter. The following are the options that can be made available in the Action section:
  - *Add Listings*: Allows you to add new portal listings to an area in the portal. Portal listings are references to materials, web sites, etc. We will discuss listings in more detail in the "Portal Listings" section later in this chapter.
  - *Add Person*: Allows you to add a listing to a portal user with an area. We will discuss people listings in more detail in the "Portal Listings" section later in this chapter.
  - *Create Subarea*: Used to create a new portal area under the area currently being displayed. We will discuss creating and managing areas in the "Managing Areas" section later in this chapter.

- *Upload Document*: Takes you to the document upload screen for the default document library created within the area. We will discuss managing documents in Chapter 6.
- *Change Settings*: Used to change the configuration settings for the currently displayed portal area.
- *Manage Security*: Used to manage the security settings for the area currently being displayed.
- *Manage Content*: Provides access to the area's Documents and Lists page where all of the content items available in the area including all listings, libraries, and lists can be accessed and managed.
- *Manage Portal Site*: Presents a graphical view of the portal area structure, allowing for drag-and-drop management of the area hierarchy. It also provides access to some of the more common area management features including editing area properties, managing area security, creating listings, and creating subareas.
- *Add to My Links*: Allows you to create a link to the currently displayed area that will be available within the My Links list in your My Site. We will discuss My Site in more detail in the "My Site" section toward the end of this chapter.
- *Alert Me*: Allows you to create an alert that will notify you of changes made to materials within the currently displayed area. We will discuss alerts in more detail in Chapter 7.
- *Edit Page*: Gives you access to the area editing options including the Modify Page capabilities and the page content management options. We will discuss page management in more detail in Chapter 7.

Table 2-1. *Actions Available by Security Site Group*

	Reader	Member	Contributor	Content Manager	Web Designer	Administrator
Add Listing		✓	✓	✓	✓	✓
Add Person		✓	✓	✓	✓	✓
Create Subarea				✓	✓	✓
Upload Document		✓	✓	✓	✓	✓
Change Settings				✓	✓	✓
Manage Security						✓
Manage Content			✓	✓	✓	✓
Manage Portal Site				✓	✓	✓
Add to My Link		✓	✓	✓	✓	✓
Alert Me		✓	✓	✓	✓	✓
Edit Page			✓	✓	✓	✓

- *Content*: Located to the right of the Current Area Navigation and Actions sections and below the Search Tools, the Content section is the main body of the portal page. This is the part of the page that contains the elements for display within the area. This may include documents, lists, portal-based applications, and references to sites or other content.

■ **Note** Portal areas can be customized by administrators through the use of available third-party add-ins and tools like Microsoft FrontPage. If changes are made to the overall structure of an area or to an area template, the location or presentation of the preceding groupings of options may vary.

Navigating Through Areas

Navigation through the portal can be a little confusing. Portals can bring together a wide variety of information located in many sources. Areas can provide access into Windows SharePoint Services sites, web sites (internal or external), applications, and content stored on network file shares or in Exchange. It is important for the portal's area structure to provide a path that is logical and easy for portal users to follow.

To navigate through available portal areas, you click the area to access either from the Area Listings Bar or the Current Area Navigation section. This will bring you to the selected area. When you navigate to an area, the content contained within the area is displayed and the name of the area is listed for easy reference at the top of the Content section. Also, the Current Area Navigation section will be updated to list the area hierarchy information for the currently displayed area.

Once you have navigated to the area, any available area management options will be listed in the Actions list. The options in this list will vary based on your rights within the area. Table 2-1 presents the complete list of actions and the security levels, or site groups, for which the options are available. When you select one of these available actions, the options listed under the action will sometimes be further restricted based on your security rights. In the following sections we will discuss the capabilities provided by the options available under the Actions section.

■ **Note** There are several third-party navigation solutions that can be added to SharePoint to extend and enhance the existing portal navigation capabilities. These options can allow you to provide alternative navigation methods as well as ways to extend the default navigation capabilities if they do not completely meet your organization's needs.

Portal Site Groups

As we mentioned, many options that are available to users within the portal are dependent on the user's security rights. Security rights are assigned through roles called site groups. Users can be assigned to site groups individually or based on their membership in Active Directory groups. Role assignments determine who can view areas, manage content in areas, edit areas,

create areas, etc. A standard set of site groups is available by default with a portal. However, it is possible to create additional site groups in order to provide customized permission levels. It is also possible to change the permissions associated with existing site groups. However, this should be done sparingly and only when creating a new site group will not meet the security requirements. The following are the standard site groups defined in an SPS portal:

- *Readers*: Can view SPS areas and area content. Readers cannot add or edit content or perform any management functions on areas. By default, Readers cannot use personal features of the portal, such as creating alerts or maintaining a personal My Site.
- *Members*: Have all the rights of a Reader as well as the ability to view and personalize areas and area content. Members can use the personal features of the portal, like alerts and My Site.
- *Contributors*: Have all rights of a Member as well as the ability to add, edit, and delete content items within an SPS area. Contributors can also browse directories and create and manage personal views of areas. Contributors cannot create new libraries and lists or manage shared views of areas.
- *Content Managers*: Have all rights of a Contributor as well as the ability to create and manage areas and listings and create WSS sites.
- *Web Designers*: Have all rights of a Content Manager as well as the ability to apply style sheets to areas.
- *Administrators*: Have full user and administrative rights to all portal areas and content.

Adding Users to Site Groups

To add a user or Active Directory group to a site group:

1. From the portal home page, click the Manage Users link under Actions.
2. On the Manage Users page, click the Add Users option.
3. On the Add Users page:
   a. Select users to add in one of two ways. The first way is to enter the Active Directory user ID (in the form domain\user), user e-mail address, or Active Directory group name (in the form domain\group) that you wish to add.

      The second way is to click the Select Users and Groups option. This option allows you to search for the desired users or groups. To use this searching capability, you would select a Find By value, which allows you to choose what attribute to search for; you then enter the search criteria and click Find. The list of accounts meeting the entered criteria will be listed. You can then add the desired users and groups to the Selected Accounts list. Once all needed accounts are in the Selected Accounts list, click OK to return to the Add Users page.

   b. Check the site groups membership that you wish to assign to the user or group.
   c. Click the Next button.

4. If the user or group information was not found in the Active Directory, an error screen will be displayed. If this screen is presented, click the browser Back button to return to the Add Users page, update the information so that it refers to a valid active directory user or group, and click the Next button.

5. If the user or group was found in Active Directory, the Add Users page containing step 3 and step 4 is presented. On this page, verify the account information and determine whether an e-mail should be sent to the user notifying that user of the change in rights by checking or unchecking the send e-mail option. This option will be disabled if a group account was selected. If a user was selected and you wish to send a notification e-mail to the user, you enter the text to be sent in the Subject and Body fields. Once the send e-mail option information has been appropriately set, click the Finish button.

■ **Note** The Confirm Users information in step 3 of the Add Users page should never need to be updated. This information is pulled from the Active Directory as part of the user profile. If this information is not accurate, it should be appropriately updated in the Active Directory by a network administrator instead of being changed in the SharePoint portal.

The user or group is added to the selected site group. The Manage Users page is displayed and the newly added site group assignment is listed.

Changing Existing Site Group Assignments

To change an existing site group assignment:

1. From the portal home page, click the Manage Users link under Actions.

2. On the Manage Users page, check the boxes in front of the site group assignments that you will be updating and click the Edit Site Groups of Selected Users option. If you are updating a single site group assignment, you can simply click the name of the assigned user or group.

3. On the Edit Site Group Membership page, update the site group assignment by checking and unchecking the site group options and then clicking the OK button to save the changes.

The updates to site group assignments are saved. The Manage Users page is displayed and the updates made are reflected in the site group assignment list.

Deleting Existing Site Group Assignments

To remove an existing site group assignment:

1. From the portal home page, click the Manage Users link under Actions.

2. On the Manage Users page, check the boxes in front of the site group assignment(s) that you will be removing and click the Remove Selected Users option.

3. Confirm the deletion of the site group assignment by clicking the OK button on the displayed message box.

The selected site group assignments are deleted. The Manage Users page is refreshed to reflect the changes made.

Managing Areas

One of the most significant benefits of a SharePoint portal is that the business owners of content can be responsible for the management of the areas and sites in which their content resides. Content owners do not need to rely on IT departments to manage portal areas, post content, or organize materials. This allows the content owners to have control over the entire information management process and allows the IT group to focus on the management of the overall portal without needing to get involved in the management of business team resources.

When SharePoint is introduced into an organization, a decision must be made concerning the level of ownership business teams will have around the management of SharePoint sites and areas. In many cases, the responsibility of maintaining the areas and the information contained in areas is given to the information owners. That said, it is often also true that the organization will want to maintain some level of consistency with navigation and layout of the overall SharePoint environment. To meet this goal, the organization will incorporate certain restrictions or policies involving area management. In this section, we will discuss the structure of areas and how they are managed. This information can then be applied to your organization in the way that best meets your desired balance between business owner control and navigation and layout consistency.

As we discussed earlier in this chapter, SPS areas are the primary tools used to organize enterprise resources being made available through a SharePoint portal. A portal area structure is made up of areas created by portal managers as well as some default specialty areas available automatically that are used to manage specific portal services. These specialty areas include the following:

- *Home*: Portal home page designed to be the gateway or entry point into the overall SharePoint environment.
- *Topics*: Default area that includes a sample area hierarchy. The Topics area is provided to allow for information to be organized by subject area.
- *News*: Area designed to contain corporate news postings.
- *Sites*: Area that organizes portal site listings. The Sites area provides a complete list of WSS and web sites and allows users to sort, filter, and group these sites based on need. The management of site listings is also handled through this area.

We will review the capabilities provided by these specialty areas later in this chapter. First we will discuss the capabilities around creating and working with basic areas.

Creating an Area

Areas can be organized to provide a navigation structure that makes it easy for workers to browse through enterprise resources when looking for resources. Areas can be nested within each other to create any hierarchy necessary. A nested area, or subarea, is created by doing the following:

1. Navigate to the area under which you wish to create the new subarea.
2. From the Actions list of the area, click the Create Subarea link.
3. On the Create Area page:
   a. Enter the name for the subarea. This is the name that will appear in the area listings. You can also enter an optional description that is displayed at the top of the subarea when it is accessed.
   b. Enter the publication date information that is used to determine when the subarea should be available for users. By default, the start date is set to today's date and the expiration date is blank, which will make the site available immediately and for an unlimited duration. You can update these two dates to limit the availability of the subarea to within a specific timeframe.
   c. Choose the location where the area will be listed. By default, the subarea will be placed under the area in which you clicked the Create Subarea link. If you wish to change this, you can click the Change Location link and select a different area under which to place the new subarea.
4. Once all of the options have been appropriately set on the Create Area page, click the OK button.

The subarea is created, and you are returned to the area in which you clicked the Create Subarea link. The new subarea is listed in the Current Area Navigation.

■ **Note** Areas can also be created through the Portal Site Map. We will discuss this in more detail in the "Managing Areas Through the Portal Site Map" section later in this chapter.

Editing Properties of an Area

Areas that have been created in SPS can be updated to address changing needs. These needs may come in the form of restructuring the site, requiring that areas be placed in different locations; or in the form of an adjustment in the purpose of an area, requiring that some attributes about the area, like title or description, be updated. To make any of these changes to an area:

1. Navigate to the area that needs to be updated.
2. From the Actions list in the area, click the Change Settings link.